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Women's Inner Fashions: Nightwear, Daywear and Loungewear

FAIRCHILD FACT FILE

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WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR

Market Trends

Women's inner fashions, a diverse grouping of many different items, are experiencing a period of growth that is unevenly distributed by product classification. While the Christmas 1984 retail season may not have lived up to some expectations, the two extra days of selling helped stores come out of it in good shape. Intimate apparel executives are projecting substantial gains for 1985. Increases of 10-15% are expected for established lines while gains of as high as 40% are seen for newer, faster growing ones. Maidenform, for example, projects an increase of more than 30% in sleepwear but just 15% in more established businesses such as foundations and daywear.

The industry is saturated with price promotions at both the manufacturer and retail levels. The "30%-off sales" have become common to the point that customers no longer expect to pay full price, particularly for foundations. Although manufacturers and stores blame these promotions for lowering profits, neither seem willing to cut down on them at this point.

The introduction of androgynous products into the marketplace has had a significant impact on inner fashion merchandising. The trend-setting Calvin Klein underwear collection may achieve retail sales of $70 million in 1985, with sleepwear and loungewear products to follow. Other manufacturers seem to be divided as to whether this "fashion statement" has reached its peak and a return to "more femininely detailed" products is imminent.

A good start to early spring selling at retail has bolstered manufacturers' hopes for the warmwear and fall transitional market. Store inventories are running low and reorders are strong, with sleepwear doing particularly well.

Some sleepwear lines are being restructured to increase fabric diversity with fabrics such as Du Pont's Monece, its co-spun Dacron polyester and Antron III nylon. Executives feel that there is a need for such innovation to be applied to daywear as well.

New lines are being introduced targeted to the ever-increasing number of working women. Miss Elaine, the branded lingerie and loungewear house, has come out with its "updated contemporary" M.E. line. Prices will be 15-30% higher than those of its traditional line.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

The U.S. Bureau of the Census is in the process of releasing its complete census of all manufacturers in the nation. Compiled every five years, preliminary 1982 data on the women's inner fashion market is now available. The statistics presented in this section are primarily 1982 Census figures with some 1983 and 1984 data supplied by other sources.

GENERAL INDUSTRY STATISTICS

The following tables show the general decline in quantity of inner fashion-related companies and their employees since the 1977 Census of Manufactures was compiled. Compared with 1981, employment in all four segments has also declined--12% in the women's underwear industry, 7% in brassieres, 10% in knit underwear mills and 10% in robes & dressing gowns. The 1981 data is based on the Census Bureau's annual survey of manufactures, which is a sample survey conducted each year between censuses.

Value of industry shipments have risen significantly in these four industries since the 1977 Census. These prices are in current dollars, so inflation should be one factor taken into consideration when making comparisons.

Women's, Misses', Children's & Infants' Underwear & Nightwear
(SIC 2341*)

	1982(p)	1977	% Change 1982/1977
Number of companies	470	548	- 14.2%
Number of establishments, total**	605	698	- 13.3
Number with 20 or more employees	423	479	- 11.7
Employees, total (thous.)	68.1	72.9	- 6.6
Production workers (thous.)	57.7	63.4	- 9.0
Payroll (mil. $)	$ 644.4	$ 472.1	+ 36.5
Value added by manufacture (mil. $) #	na	915.3	--
Value of industry shipments (mil. $) ##	2,623.3	1,780.8	+ 47.3
Capital expenditures, new (mil. $)	30.5	18.7	+ 63.1

Brassieres, Girdles & Allied Products (SIC 2342*)

	1982(p)	1977	% Change 1982/1977
Number of companies	131	150	- 12.7%
Number of establishments, total**	150	180	- 16.7
Number with 20 or more employees	96	116	- 17.2
Employees, total (thous.)	13.6	18.9	- 28.0
Production workers (thous.)	11.1	15.2	- 27.0
Payroll (mil. $)	$ 138.9	$ 141.1	- 1.6
Value added by manufacture (mil. $) #	na	334.4	--
Value of industry shipments (mil. $) ##	695.3	650.0	+ 7.0
Capital expenditures, new (mil.$)	7.4	4.2	+ 76.2

(continued)

GENERAL INDUSTRY STATISTICS

Knit Underwear Mills (SIC 2254*)

	1982(p)	1977	% Change 1982/1977
Number of companies	70	80	- 12.5%
Number of establishments, total **	85	92	- 7.6
Number with 20 or more employees	62	74	- 16.2
Employees, total (thous.)	22.6	25.2	- 10.3
Production workers	20.3	23.4	- 13.2
Payroll (mil. $)	$ 235.5	$ 175.2	+ 34.4
Value added by manufacture (mil. $)#	na	305.7	--
Value of industry shipments (mil. $) ##	841.4	648.9	+ 29.7
Capital expenditures, new (mil. $)	9.4	14.5	+ 35.2

Robes & Dressing Gowns (SIC 2384*)

	1982(p)	1977	% Change 1982/1977
Number of companies	128	136	- 5.9%
Number of establishments, total **	135	152	- 11.2
Number with 20 or more employees	83	99	- 16.2
Employees, total (thous.)	9.3	9.6	- 3.1
Production workers (thous.)	8.1	8.3	- 2.4
Payroll (mil. $)	$ 88.0	$ 65.1	+ 35.2
Value added by manufacture (mil. $) #	193.1	141.9	+ 36.1
Value of industry shipments (mil. $) ##	403.6	293.6	+ 37.5
Capital expenditures, new (mil. $)	3.9	3.3	+ 18.2

(p) preliminary na not available

* Manufacturers are classified by industry under the Standard Industrial Classification System (SIC), determined by the principal product made, as shown below:

SIC 2341 - This industry comprises establishments primarily engaged in manufacturing women's, misses', children's and infants' underwear and nightwear cut and sewed from purchased woven or knit fabric.

SIC 2342 - This industry comprises establishments primarily engaged in manufacturing brassieres, girdles, corsets, corset accessories, and allied garments.

SIC 2254 - This industry comprises establishments primarily engaged in knitting underwear and nightwear from yarn or in manufacturing underwear and nightwear from knit fabric produced in the same establishments. Industry figures include underwear and nightwear for both men and women as well as for children and infants.

SIC 2384 - This industry comprises establishments primarily engaged in manufacturing men's and women's robes and dressing gowns.

**Each business location is counted as a separate establishment.

(footnotes continued)

Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value of measure of individual industries.

##Value of industry shipments represents the net selling values, f.o.b., plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts for contract work and resales). (For value of product shipments, only, including shipments by all producers, see page 14).

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982
Preliminary Report, Industry Series MC 82-1

Apparent Consumption

Apparent consumption is defined as domestic shipments plus imports minus exports. U.S. apparent consumption of women's & children's underwear has increased by 7.5% in units and 16.1% in dollars from 1982 to 1983. Apparent consumption of pajamas is up 5.2% and 4.0%, respectively, over the same period.

U.S. Apparent Consumption of Women's & Children's Underwear & Pajamas, 1983

	QUANTITY (Thous. Dozen)			
	Shipments	Exports	Imports	Apparent Consumption
Women's, girls' & infants':				
Underwear	64,274	2,495	10,165	71,944
Pajamas	20,525	293	1,645	21,878

	VALUE (Mil. $)			
	Shipments	Exports*	Imports**	Apparent Consumption
Underwear	$ 1,083.5	$ 24.5	$ 80.9	$ 1,138.2
Pajamas	1,252.8	10.1	79.9	1,312.9

* Estimated producers' value, which excludes freight, insurance and other charges incurred in moving goods to the port of export.

**C.I.F. value at first port of entry in the U.S. plus import duties. For a further explanation of C.I.F. value, see the Import section on page 17.

Source: U.S. Bureau of the Census,
Current Industrial Reports, MA23G(83)-1

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Figures on employment compiled by the U.S. Bureau of Labor Statistics show that the nation's economic recovery has had a positive impact on women's inner fashion industries. These figures are not directly comparable with Census data on employment due to a difference in the methodology used.

Employment & Earnings in Selected Women's Inner Fashion Industries

	Jan.-Sept. Average			Annual Averages		
	1984	1983	% Change 1984/83	1983	1982	% Change 1983/82
Knit underwear mills:						
All employees (thous.)	30.9	29.7	+ 4.0%	30.1	28.7	+ 4.9%
Production workers (thous.)	26.6	25.2	+ 5.5	25.6	24.2	+ 5.8
Average weekly earnings	$208.20	$197.19	+ 5.6	$199.50	$177.33	+ 12.5
Average hourly earnings	5.54	5.30	+ 4.5	5.32	5.17	+ 2.9
Average weekly hours	37.6	37.2	+ 1.1	37.5	34.3	+ 9.3
Women's & children's underwear:						
All employees (thous.)	71.5	66.6	+ 7.4	67.8	67.5	+ 0.4
Production workers (thous.)	61.8	57.6	+ 7.3	58.7	58.7	--
Average weekly earnings	$182.36	$173.13	+ 5.3	$176.05	$161.12	+ 9.3
Average hourly earnings	4.94	4.79	+ 3.1	4.81	4.63	+ 3.9
Average weekly hours	36.9	36.2	+ 1.9	36.6	34.8	+ 5.2
Women's brassieres & allied garments						
All employees (thous.)	16.4	16.0	+ 2.5	16.2	16.0	+ 1.2
Production workers (thous.)	12.3	12.0	+ 2.5	12.1	12.1	--
Average weekly earnings	$204.79	$184.72	+ 10.9	$189.02	$171.02	+ 10.5
Average hourly earnings	5.57	5.24	+ 6.3	5.28	5.09	+ 3.7
Average weekly hours	36.8	35.2	+ 4.5	35.8	33.6	+ 6.5

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

Employment Size

The Women's Inner Fashion Industry by Employment Size, 1982

	Establishments		Employees	
	Number	% of Total	Number (Thous.)	% of Total
Women's & children's underwear & nightwear (SIC 2341), total	587	100.0%	70.4	100.0%
Under 20 employees	157	26.7	na	--
20-99 employees	208	35.4	11.2	15.9
100-499 employees	204	34.7	45.5	64.6
500 or more employees	18	3.1	na	--

(continued)

GENERAL INDUSTRY STATISTICS

Employment Size

The Women's Inner Fashion Industry by Employment Size, 1982
(continued)

	Establishments		Employees	
	Number	% of Total	Number (Thous.)	% of Total
Brassieres & allied garments (SIC 2342), total	144	100.0%	14.1	100.0%
Under 20 employees	50	34.7	0.3	2.1
20-99 employees	53	36.8	2.8	19.9
100-499 employees	36	25.0	7.9	56.0
500 or more employees	5	3.5	3.1	22.0
Knit underwear mills (SIC 2254), total	84	100.0	24.4	100.0
Under 20 employees	17	20.2	0.1	0.4
20-99 employees	27	32.1	1.6	6.5
100-499 employees	28	33.3	6.6	27.0
500 or more employees	12	14.3	16.1	66.0
Robes & dressing gowns (SIC 2384), total	135	100.0	9.3	100.0
Under 20 employees	52	38.5	0.3	3.2
20-99 employees	54	40.0	2.5	26.9
100-499 employees 500 or more employees	29	21.5	6.5	69.9

Source: U.S. Bureau of the Census,
County Business Patterns, 1982
Census of Manufactures, 1982

na not available
Note: Totals may not equal 100.0% due to rounding.
For description of SIC classifications, see page 3.

Concentration in the Industry

The Census Bureau will not release Concentration Ratios in Manufacturing for 1982 until late this year. As a result, the most recent data available on this are ratios from the 1977 Census of Manufactures.

The 50 largest firms (ranked on shipment value) in the women's and children's underwear industry controlled 63% of the industry shipment value in 1977, although they accounted for only 9% of all firms classified in the industry. A fifth of the value of shipments in this industry was attributed to the top four firms alone.

In the three remaining industries--brassieres and allied garments, knit underwear mills, and robes and dressing gowns--the 50 leading companies accounted for over 90% of the industry shipment value.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Percent of Selected Industry Activity Accounted For By the 50 Largest Companies in Each Industry, 1977

	Companies	Plants	Value Added by Manufacture	Value of Industry Shipments
Women's & children's underwear (SIC 2341), total	548	698	$ 915.3	$ 1,780.3
Share accounted for by:				
4 largest companies	0.7%	4.2%	19.9%	21.5%
8 largest companies	1.4	6.8	29.2	27.5
20 largest companies	3.6	11.7	42.7	41.7
50 largest companies	9.1	22.7	63.1	63.2
Brassieres & allied garments (SIC 2342), total	150	180	$ 334.4	$ 650.0
Share accounted for by:				
4 largest companies	2.7%	7.8%	38.4%	36.4%
8 largest companies	5.4	13.4	55.4	52.2
20 largest companies	13.4	25.1	77.0	77.2
50 largest companies	33.4	43.4	92.1	92.3
Knit underwear mills (SIC 2254), total	80	92	$ 305.7	$ 648.9
Share accounted for by:				
4 largest companies	5.0%	6.5%	37.0%	42.1%
8 largest companies	10.0	13.0	53.6	58.5
20 largest companies	25.0	32.6	83.0	84.5
50 largest companies	62.5	67.4	98.3	98.6
Robes & dressing gowns (SIC 2384), total	137	151	$ 139.5	$ 288.3
Share accounted for by:				
4 largest companies	2.9%	5.3%	21.8%	25.3%
8 largest companies	5.8	10.6	34.1	43.6
20 largest companies	14.6	21.2	62.6	69.1
50 largest companies	36.5	41.7	84.9	90.2

For description of SIC classifications, see page 3.

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Concentration Ratios in Manufacturing, MC77-SR-9.

GENERAL INDUSTRY STATISTICS

Leading States

New York is clearly the predominant state in the production of women's inner fashions. It leads in industry shipments of women's & children's underwear, brassieres & allied garments and robes & dressing gowns. North Carolina has the most shipments coming out of knit underwear mills.

Percent of Inner Fashion Industry Activity Accounted For By Leading States, 1982

	Value of Industry Shipments ($ in millions)
Women's & children's underwear (SIC 2341), total	$ 2,623.3
Leading states:	
New York	20.1%
Pennsylvania	8.2
New Jersey	6.9
Georgia	6.1
Brassieres & allied garments (SIC 2342), total	$ 695.3
Leading states:	
New York	29.1%
Georgia	21.2
California	12.7
New Jersey	7.7
Knit underwear mills (SIC 2254), total	$ 841.4
Leading states:	
North Carolina	25.1%
Pennsylvania	18.2
New York	7.4
Georgia	5.5
Robes & dressing gowns (SIC 2384), total	$ 403.6
Leading states:	
New York	42.0
South Carolina	12.9
California	9.6
Tennessee	2.1

For description of SIC classifications, see page 3.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982
Preliminary Report, Industry Series MC82-1

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GENERAL INDUSTRY STATISTICS

Leading States

Despite the industry-wide decline in inner fashion-related companies and their employees from 1977 to 1982, New York has maintained its position as the industry's leading employer as well as having the highest value of shipments. Two other leading states that are having an increasingly important impact on the industry are Pennsylvania and New Jersey.

Inner Fashion Industry Activity in New York, Pennsylvania, New Jersey, 1977 & 1982

	New York			Pennsylvania			New Jersey		
	1982	1977	% Change 1982/77	1982	1977	% Change 1982/77	1982	1977	% Change 1982/77
Women's & children's underwear (SIC 2341)									
Number of establishments, total	188	266	- 29.3%	67	83	- 19.3%	33	37	- 10.8%
Number with 20 or more employees	84	132	- 36.4	60	69	- 13.0	21	21	--
Employees, total (thous.)	6.2	8.8	- 29.5	7.6	8.2	- 7.3	3.2	2.0	+ 60.0
Production workers (thous.)	5.0	7.0	- 28.6	6.9	7.0	- 1.4	2.3	1.8	+ 27.8
Payroll (mil. $)	$ 73.5	70.1	+ 4.8	$ 69.6	51.7	+ 34.6	$ 34.4	12.7	+170.9
Value of industry shipments (mil. $)	527.2	416.6	+ 26.5	214.0	158.4	+ 35.1	182.4	53.2	+242.9
Capital expenditures, new (mil. $)	1.9	1.7	+ 11.8	1.9	2.0	- 5.0	na	na	--
Brassieres & allied garments (SIC 2342)									
Number of establishments, total	59	66	- 10.6	14	16	- 12.5	18	14	+ 28.6
Number with 20 or more employees	32	34	- 5.9	10	13	- 23.1	9	6	+ 50.0
Employees, total (thous.)	3.6	3.8	- 5.3	1.4	1.4	--	0.7	1.4	- 50.0
Production workers (thous.)	2.9	2.8	+ 3.6	1.2	1.3	- 7.7	0.5	0.9	- 44.4
Payroll (mil. $)	$ 39.5	31.0	+ 27.4	$ 14.5	9.6	+ 51.0	$ 8.6	13.7	- 37.2
Value of industry shipments (mil. $)	202.1	161.0	+ 25.4	48.4	29.5	+ 64.1	53.5	87.2	- 38.6
Capital expenditures, new (mil. $)	1.8	0.9	+100.0	0.2	0.1	+100.0	na	na	--

na not available

For description of SIC classifications, see page 3.

Source: U.S. Bureau of the Census, Census of Manufactures, 1982, Preliminary Report, Geographic Area Series MC82-A-2

PRODUCTION

Official estimates of the annual U.S. production and value of shipments of specified women's innerwear and nightwear items are released by the Census Bureau as part of the Current Industrial Reports series. The estimates are based on a survey of manufacturers, contractors and jobbers and includes items cut in the U.S. and sent outside the country to be sewn, as well as products from Puerto Rican plants.

PRODUCTION

The 1983 report on underwear & nightwear shows a modest increase in the quantity of women's inner fashions produced over the year before. Panties account for the bulk of the production at an estimated 36,172 thousand dozen units. The largest increase came in the production of union suits/camisoles/thermal underwear, with a 26.6% gain from 1982 to 1983.

Production Quantity of Women's Innerwear & Nightwear by All U.S. Producers--1982, 1983

	1983 Quantity (Thous. Doz.)	% Change 1983/1982
Women's, misses' & juniors':		
Full-length slips	2,985	+ 1.1%
Half-slips, excluding pettipants	2,563	+ 2.2
Panties, including pettipants	36,172	+ 2.1
Union suits, camisoles, thermal underwear, etc.	4,183	+ 26.6
Nightgowns & sleepcoats, excluding sets with robes	9,882	+ 1.0
Pajamas, except sets with robes	1,797	+ 0.4
Peignoir & robe sets with nightgown or pajamas	1,065	+ 2.1
Separate bedjackets & peignoirs, excluding lounge robes	130	- 3.0
Robes, dressing gowns, housecoats, etc.	2,813	+ 6.1

Source: U.S. Bureau of the Census, Current Industrial Reports, Underwear & Nightwear MA23G(83)-1.

The CIR on women's innerwear and nightwear provides detailed production information on fabric and construction use. Comparable data for earlier years is not available at this level of detail.

Production of Reported Types of Women's Innerwear & Nightwear By Fabric & Construction, 1983

	Thous. Dozen	% of Total
Full length slips	2,985	100.0%
By construction:		
Woven fabric	518	17.3
Knit fabric	2,388	80.0
Fabric, n.s.k.	79	2.6
By fabric:		
All cotton & chiefly cotton	90	3.0
All man-made & chiefly man-made	2,291	76.7
All other fabric } Fabric, n.s.k. }	604	20.2

(continued)

Production of Reported Types of Women's Innerwear & Nightwear
By Fabric & Construction, 1982
(continued)

	Thous. Dozen	% of Total
Half-slips, excluding pettipants	2,563	100.0%
By construction:		
Woven fabric	489	19.1
Knit fabric	1,901	74.2
Construction, n.s.k.	173	6.7
By fabric:		
All cotton & chiefly cotton	59	2.3
All man-made & chiefly man-made	2,326	90.7
Fabric, n.s.k.	178	6.9
Panties, including pettipants	36,172	100.0
By construction:		
Woven fabric	898	2.5
Knit fabric	33,558	92.8
Construction, n.s.k.	1,716	4.7
By fabric:		
All cotton & chiefly cotton	9,351	25.8
All man-made & chiefly man-made	25,187	69.6
All other fabric, Fabric, n.s.k.	1,634	4.5
Union suits, camisoles, thermal underwear, etc.	4,183	100.0
By construction:		
Woven fabric	39	0.9
Knit fabric	3,434	82.1
Construction, n.s.k.	710	17.0
By fabric:		
All cotton & chiefly cotton	309	7.4
All man-made & chiefly man-made	3,122	74.6
All other fabric, Fabric, n.s.k.	752	18.0
Nightgowns & sleepcoats, excluding sets with robes	9,882	100.0
By construction:		
Woven fabric	3,782	38.3
Knit fabric	5,647	57.1
Construction, n.s.k.	453	4.6
By fabric:		
All cotton & chiefly cotton	1,563	15.8
All man-made & chiefly man-made	7,901	79.9
All other fabric, Fabric, n.s.k.	418	4.2

(continued)

Production of Reported Types of Women's Innerwear & Nightwear By Fabric & Construction, 1983 (continued)

	Thous. Dozen	% of Total
Pajamas, except sets with robes	1,797	100.0%
By construction:		
Woven fabric	940	52.3
Knit fabric	823	45.8
Construction, n.s.k.	34	1.9
By fabric:		
All cotton & chiefly cotton	226	12.6
All man-made & chiefly man-made / All other fabric	1,538	85.6
Fabric, n.s.k.	33	1.8
Peignoir & robe sets with nightgown or pajamas	1,065	100.0
By construction:		
Woven fabric	225	21.1
Knit fabric	532	49.9
Construction, n.s.k.	308	28.9
By fabric:		
All cotton & chiefly cotton	29	2.7
All man-made & chiefly man-made / All other fabric	709	66.6
Fabric, n.s.k.	327	30.7
Separate bedjackets & peignoirs, excluding lounge robes	130	100.0
By construction:		
Woven fabric	62	47.7
Knit fabric	38	29.2
Construction, n.s.k.	30	23.1
By fabric:		
All cotton & chiefly cotton	19	14.6
All man-made & chiefly man-made	81	62.3
Fabric, n.s.k.	30	23.1
Robes, dressing gowns, housecoats, etc.	2,813	100.0
By construction:		
Woven fabric	1,460	51.9
Knit fabric	1,056	37.5
Construction, n.s.k.	297	10.5
By fabric:		
All cotton & chiefly cotton	361	12.8
All man-made & chiefly man-made	2,197	78.1
All other fabric / Fabric, n.s.k.	255	9.1

n.s.k. not specified by kind

Source: U.S. Bureau of the Census, Current Industrial Reports, Underwear & Nightwear MA23G(83)1.

PRODUCTION

Materials Consumed in Production

The amount of fiber consumed in the production of women's and children's innerwear and nightwear increased 12.2% in 1983 over the previous year. This gain, to 198.3 million pounds, reversed a continuous decline in reported consumption from 1978 to 1982, during which there was a 46.3% drop.

Fiber use in the production of robes & loungewear rose 10.3% in 1983, following a 30% decline in 1982 compared with 1981.

Consumption of Fibers in the Production of Women's & Children's Innerwear & Nightwear, 1981-1983

	Millions of Pounds			
	1983	1982	1981	% Change 1983/1982
Innerwear & nightwear, total*	198.3	176.8	202.4	+ 12.2%
Man-made fibers, total	153.0	136.1	162.0	+ 12.4
Cellulosic	12.5	10.9	18.3	+ 14.7
Non-cellulosic	140.5	125.2	143.7	+ 12.6
Cotton	44.3	39.7	39.2	+ 11.6
Wool	1.0	1.0	1.2	--
Robes & loungewear, total**	91.8	83.2	119.3	+ 10.3
Man-made fibers, total	74.8	67.4	102.5	+ 11.0
Cellulosic	39.0	34.5	44.8	+ 13.0
Non-cellulosic	35.8	32.9	57.7	+ 8.8
Cotton	14.4	13.5	14.0	+ 6.7
Wool	2.6	2.3	2.8	+ 13.0

* Excludes trim, elastic webbing, apparel lace, braid or narrow fabric used.
** Includes men's and boys' beach and bath robes, dressing gowns and smoking jackets as well as women's beach and bath robes and housecoats.

Source: Textiles Economics Bureau, Inc.
Textile Organon, September 1984

SHIPMENTS

The Census Bureau's 1983 report on the value of shipments of underwear and nightwear shows that nightgowns & sleepcoats have the highest dollar value assigned to them when they leave the factory. They accounted for 31.9% of the total value for this product classification. Panties, with 22.0% of the total, had the largest gain from 1982 to 1983--22.5%.

SHIPMENTS

Value of Shipments of Women's Innerwear & Nightwear by All U.S. Producers--1982, 1983

	Value of Shipments 1983 (Mil. $)	% Change 1983/1982
Women's, misses' & juniors':		
Full-length slips	$ 185.4	+ 2.8%
Half-slips, excluding pettipants	113.8	+ 6.4
Panties, including pettipants	484.3	+ 22.5
Union suits, camisoles, thermal underwear, etc.	134.1	+ 18.5
Nightgowns & sleepcoats, excluding sets with robes	700.9	+ 3.3
Pajamas, except sets with robes	104.4	+ 1.5
Peignoir & robe sets with nightgown or pajamas	123.1	+ 3.4
Separate bedjackets & peignoirs, excluding lounge robes	15.6	- 1.3
Robes, dressing gowns, housecoats, etc.	337.0	+ 10.5

Source: U.S. Bureau of the Census, Current Industrial Reports, Underwear & Nightwear MA-23G(83)-1.

Shipments of brassieres, girdles & allied garments totaled 21,366 thousand dozen units in 1983 at a value of $973 million. Brassieres, bra-lettes & bandeaux accounted for the bulk of this, both in unit and dollar volume. Puerto Rican production of brassieres increased significantly from 1982 to 1983.

Quantity & Value of Shipments of Brassieres, Girdles & Allied Garments From Domestic & Puerto Rican Producers, 1982, 1983

	Quantity (Thous. Dozen)			Value of Shipments (Mil. $)		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Brassieres, girdles & allied garments, total	21,366	20,298	+ 5.3%	$973.0	$904.7	+ 7.5%
Domestic producers	14,117	14,062	+ 0.4	621.2	608.6	+ 2.1
Puerto Rican producers	7,249	6,236	+ 16.2	351.8	296.1	+ 18.8
Brassieres, bra-lettes & bandeaux, total	17,761	16,629	+ 6.8	766.3	707.2	+ 8.4
Domestic producers	11,574	11,430	+ 1.3	455.1	451.1	+ 0.9
Puerto Rican producers	6,187	5,199	+ 19.0	311.2	256.1	+ 21.5
Girdles & other foundation garments, total	3,605	3,669	- 1.7	206.7	197.5	+ 4.7
Domestic producers	2,543	2,632	- 3.4	166.1	157.5	+ 5.5
Puerto Rican producers	1,062	1,037	+ 2.4	40.6	40.0	+ 1.5

Source: U.S. Bureau of the Census, Current Industrial Reports, Brassieres, Girdles & Allied Garments MA-23J(83)-1.

SHIPMENTS

Shipments of Women's Foundation Garments by All U.S. Producers, By Factory (Wholesale) Price Line, 1982, 1983

	(Thous. Dozen) 1983	1982	% Change 1983/1982
Brassieres, bra-lettes & bandeaux	17,761	16,629	+ 6.8%
Brassieres (with band 3" or more) excluding bra-lettes	489	507	- 3.5
Bra-lettes (hip-length with garters) including briefers	36	51	- 29.4
Bandeaux (with less than 3" bands)	17,236	16,071	+ 7.2
Strap, regular	11,927	10,853	+ 9.9
$12.75 & under per dozen	317	412	- 23.0
$12.76 to $15.50 per dozen	606	637	- 4.9
$15.51 to $19.25 per dozen	1,085	926	+ 17.2
$19.26 to $30.00 per dozen	1,991	1,754	+ 13.5
$30.01 & over per dozen	7,928	7,124	+ 11.3
Strap, padded or contour-lined	4,284	4,283	--
Strapless or convertible	1,025	935	+ 9.6
Girdles, corsets & other foundation garments	3,605	3,669	- 1.7
Corsets (back-laced or front-laced)	6	5	+ 20.0
Girdles	3,094	3,166	- 2.3
Girdles (with opening) including girdles made of latex	653	620	+ 5.3
$36.00 & under per dozen	183	212	- 13.7
$36.01 to $65.99 per dozen	285	271	+ 5.2
$66.00 to $95.99 per dozen	100	81	+ 23.4
$96.00 & over per dozen	85	56	+ 51.8
Girdles (without opening) including girdles made of latex	2,441	2,546	- 4.1
$30.00 & under per dozen	793	1,010	- 21.5
$30.01 to $51.00 per dozen	690	635	+ 8.7
$51.01 & over per dozen	958	901	+ 6.3
Combination of one-piece garments (corselets)	279	298	- 6.4
Maternity foundation garments (including corsets & combination)	82	63	+ 30.1
Garter belts	144	137	+ 5.1

Note: Includes foundation garments made in Puerto Rican plants.

Source: U.S. Bureau of the Census, Current Industrial Reports, Brassieres, Girdles and Allied Garments, MA-23J(83)-1.

PRODUCER PRICE INDEX

Prices of brassieres, girdles, panties, slips and nightgowns rose faster at the producer (factory) price level during the first ten months of 1984 than did the overall price of women's apparel. The biggest gainer was girdle items which increased 5.2% from the first ten months of 1983. The highest price level is that of brassieres, which were the second fastest gainer with an increase for the year of 3.5%

PRODUCER PRICE INDEX

Producer Price Indexes of Selected Types
of Women's Innerwear & Nightwear, 1982, 1983 & Jan.-Oct. 1983, 1984
(1967=100 unless otherwise indicated)

	Jan.-Oct. Averages			Annual Averages		
	1984	1983	% Change 1984/1983	1983	1982	% Change 1983/1982
All commodities	310.2	302.5	+ 2.5%	303.1	299.3	+ 1.3%
Apparel, total	200.7	197.0	+ 1.9	197.4	194.4	+ 1.5
Women's	178.8	176.4	+ 1.4	176.8	173.1	+ 2.1
Brassieres	228.9	221.2	+ 3.5	221.7	215.3	+ 3.0
Girdles, corsets, combinations & accessories	186.6	177.4	+ 5.2	177.2	173.7	+ 2.0
Panties (12/77=100)	153.7	150.4	+ 2.2	150.6	143.6	+ 4.9
Slips, half-slips & petticoats (12/77=100)	145.9	142.4	+ 2.4	142.8	142.7	--
Nightgowns & sleepcoats	161.7	158.6	+ 1.9	158.8	152.8	+ 3.9

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

Imports

Imports of women's and children's inner fashions during the first three quarters of 1984 were up significantly over the corresponding 1983 period. These gains, both in the quantity imported for consumption and their customs (C.I.F.) value, exceeded increases for yearend 1983 versus yearend 1982 (see following table).

According to the Census Bureau, the number of brassieres imported into the U.S. increased 7.8% from January to September 1984 over the same nine months in 1983. Their valuation was 13.4% more. Corsets, garters & other body-supporting garments had an even larger gain--the quantity imported rose 37.5% while the customs value improved 42.4%.

In other inner fashion categories, undergarment imports increased 37.9% in quantity and 54.8% in value while pajamas registered gains of 25% and 34%, respectively. Dressing gowns & robes were up 26.9% and 39.9% during the first three quarters of 1984.

Imports of Women's & Children's Innerwear & Nightwear
By Leading Countries of Origin, 1982, 1983

	Quantity (Thous. Dozen)			C.I.F. Value* (Mil. $)		
	1983	1982	% Change 1983/82	1983	1982	% Change 1983/82
Brassieres, total	12,331.4	11,521.5	+ 7.0%	$ 166.7	$ 157.4	+ 5.9%
Cotton	270.3	136.2	+ 98.5	3.6	1.8	+100.0
Philippines	136.3	91.7	+ 48.6	1.6	1.0	+ 60.0
Hong Kong	42.9	nr	--	0.4	nr	--
Man-made fibers	12,039.9	11,378.1	+ 5.8	162.3	155.3	+ 4.5
Philippines	2,592.7	2,530.9	+ 2.4	26.6	25.0	+ 6.4
Costa Rica	1,931.8	1,503.6	+ 28.5	24.1	18.1	+ 33.1

(continued)

Imports

Imports of Women's & Children's Innerwear & Nightwear By Leading Countries of Origin, 1982, 1983 (continued)

	Quantity (Thous. Dozen)			C.I.F. Value* (Mil. $)		
Brassieres (continued)	1983	1982	% Change 1983/82	1982	1981	% Change 1983/82
All other materials	21.2	7.2	+194.4%	$ 0.8	$ 0.3	+166.7%
Netherlands	7.1	nr	--	0.2	nr	--
United Kingdom	5.9	nr	--	0.2	nr	--
Corsets, garters & other body-supporting garments	843.2	nr	--	15.8	12.9	+ 22.5
Mexico	252.7	nr	--	5.8	4.2	+ 38.1
Haiti	126.4	nr	--	1.2	1.4	- 14.3
Undergarments, nspf, of textile materials, total	11,941.0	8,802.0	+ 35.7	126.4	108.3	+ 16.7
Not knit	1,594.8	1,399.1	+ 14.0	52.4	46.8	+ 12.0
Hong Kong	591.4	546.7	+ 8.2	21.5	20.0	+ 7.5
China	261.6	133.3	+ 96.2	7.0	5.2	+ 34.6
Knit	10,346.2	7,402.9	+ 39.8	74.0	61.5	+ 20.3
Hong Kong	5,562.5	4,159.3	+ 33.7	27.6	21.3	+ 29.6
Dominican Republic	1,072.3	853.2	+ 25.7	11.1	10.3	+ 7.8
Pajamas, cotton, not knit	381.9	455.1	- 16.1	13.9	18.8	- 26.1
Hong Kong	250.2	358.2	- 30.1	9.3	14.8	- 37.2
Dominican Republic	23.4	nr	--	0.7	nr	--
Dressing gowns & robes, not knit, total	431.0	353.4	+ 22.0	26.9	22.3	+ 20.6
Cotton	291.6	258.3	+ 12.9	18.5	15.6	+ 18.6
Hong Kong	88.4	109.5	- 19.3	4.2	4.9	- 14.3
China	52.5	41.8	+ 25.6	2.5	1.7	+ 47.1
Wool or man-made fiber	132.9	91.7	+ 44.9	7.2	5.9	+ 22.0
Hong Kong	58.9	58.9	--	2.8	3.2	- 12.5
China	37.4	16.1	+132.3	1.7	1.1	+ 54.5
Silk	6.5	3.4	+ 91.2	1.2	0.8	+ 50.0
Hong Kong	2.6	1.7	+ 52.9	0.6	0.4	+ 50.0
China	2.3	0.8	+187.5	0.3	0.1	+200.0

nr not reported
nspf not specially provided for
*The C.I.F. (cost, insurance, freight) value is based upon the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports FT 135,
December 1982, 1983.

FOREIGN TRADE

Exports

The number of women's and children's innerwear and nightwear products exported by U.S. manufacturers rose 5.3% in 1983 over the prior year. Shipments of brassieres, underwear, garters, body-supporting garments, pajamas/nightwear and robes/dressing gowns totaled $12,217 thousand dozen units for the year. The value of these exports was down 4.8%, however, due in part to the effect of a strong dollar.

Of the six inner fashion categories mentioned above, only one--brassieres--had increased exports in 1983. Brassieres accounted for 73.7% of the exports reported. The decline in overseas shipments in the other five areas was not as large as that recorded from 1981 to 1982.

U.S. Exports of Women's & Children's Innerwear & Nightwear
1982, 1983

	Quantity (Thous. Dozen)			Value* (Mil. $)		
	1983	1982	% Change 1983/82	1983	1982	% Change 1983/82
Total, all reported categories	12,217.0	11,597.5	+ 5.3%	$130.6	$137.2	- 4.8%
Brassieres, total	9,007.0	7,309.3	+ 23.2	80.5	68.4	+ 17.7
Cotton	942.6	716.0	+ 31.6	7.4	5.4	+ 37.0
Man-made fibers	6,884.5	5,712.4	+ 20.5	60.8	53.8	+ 13.0
All other materials	1,179.8	880.9	+ 33.9	12.3	9.2	+ 33.7
Underwear, total	2,495.4	3,303.9	- 24.5	26.1	39.8	- 34.4
Not knit	1,042.7	1,637.3	- 36.3	7.9	17.2	- 54.1
Cotton	88.1	221.0	- 60.1	0.5	1.5	- 66.7
Man-made fibers	138.2	456.5	- 69.7	2.4	6.5	- 63.1
All other materials	816.4	959.8	- 14.9	5.0	9.2	- 45.6
Knit	1,452.7	1,666.6	- 12.8	18.2	22.6	- 19.5
Cotton	443.8	687.2	- 35.4	3.9	5.8	- 32.8
Man-made fibers	892.2	838.3	+ 6.4	11.8	13.9	- 15.1
All other materials	116.7	141.1	- 17.3	2.5	2.9	- 13.8
Garters, garter belts & suspenders, total	144.2	169.4	- 14.9	1.1	1.1	--
Body-supporting garments, except brassieres, total	173.8	249.5	- 30.3	4.4	4.9	- 10.2
Pajamas & other nightwear, total	292.4	444.4	- 34.2	10.8	15.0	- 28.0
Not knit	130.5	216.0	- 39.6	5.0	8.5	- 41.2
Cotton	19.2	45.4	- 57.7	0.6	1.5	- 60.0
Man-made fibers	87.5	140.2	- 37.6	3.7	5.7	- 35.1
Wool	2.4	4.5	- 46.7	0.1	0.3	- 66.7
All other materials	21.4	25.9	- 17.4	0.6	1.0	- 40.0
Knit	161.9	228.4	- 29.1	5.8	6.5	- 10.8
Cotton	9.7	31.9	- 69.6	0.4	1.0	- 60.0
Man-made fibers	99.5	147.8	- 32.7	3.2	3.2	--
Wool	7.0	3.9	+ 79.5	0.2	0.1	+100.0
All other materials	45.7	44.8	+ 2.0	2.0	2.2	- 9.1

(continued)

FOREIGN TRADE

Exports

U.S. Exports of Women's & Children's Innerwear & Nightwear
1982, 1983
(continued)

	Quantity (Thous. Dozen)			Value* (Mil. $)		
	1983	1982	% Change 1983/82	1983	1982	% Change 1983/82
Robes & dressing gowns, not knit, total	104.2	121.0	- 13.9%	$ 7.7	$ 8.0	- 3.7%
Cotton	42.7	56.2	- 24.0	2.2	2.8	- 21.4
Man-made fibers	59.9	61.7	- 2.9	4.9	5.0	- 2.0
Wool	1.6	3.1	- 48.4	0.6	0.2	+200.0

*The export value is based on the transaction price, including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. As defined, the value excludes the cost of loading the merchandise aboard the carrier and also excludes freight, insurance and other charges incurred beyond the port of exportation.

Source: U.S. Bureau of the Census,
U.S. General Exports FT 410,
December 1982, 1983.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

Over the next 10 years, the size of the U.S. female population aged 16 or older will expand to nearly 103 million women. This increase of 9.1% is somewhat smaller than the projected growth rate of this segment from 1994 to 2005. By the year 2005, there will be more than 113 million women aged 16 or older.

The growth rate cited above will not be evenly distributed by age group, according to the Census Bureau. Children of the baby boom will show large gains for the next decade while the declining birth rate in recent years will limit the number of teenagers over this time frame.

Female Population of the U.S., 1984 & Projections to 2005*
(In Millions)

	Number (Thousands)			% Change	Percent Distribution		
	1984	1994	2005	2005/1984	1984	1994	2005
Total, all ages	121,343	132,251	141,381	+ 16.5%	100.0%	100.0%	100.0%
Under 5 years	8,904	9,188	8,518	- 4.3	7.3	6.9	6.0
5 to 9 years	7,924	9,415	8,678	+ 9.5	6.5	7.1	6.1
10 to 15 years	10,236	10,745	11,167	+ 9.1	8.4	8.1	7.9
16 years & over	94,279	102,903	113,018	+ 19.9	77.7	77.9	80.0
16 - 19	7,357	6,426	7,707	+ 4.8	6.1	4.9	5.5
20 - 34	31,205	29,068	26,706	- 14.4	25.7	22.0	18.9
35 - 54	27,115	36,202	41,249	+ 52.1	22.3	27.4	29.2
55 - 64	11,834	11,002	15,399	+ 30.1	9.8	8.3	10.9
65 & over	16,678	20,205	21,957	+ 30.9	13.8	15.3	15.5
Median age (years)	32.4	35.6	39.2	+ 21.0	--	--	--

*Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census,
Current Population Reports
Series P-25, No. 952 (May 1984)

The following table covers estimates of the current adult female population in specified height/weight groups, based on an analysis of information from the U.S. Department of Health and Human Services and the U.S. Census Bureau.

Based on current projections, some 15.5 million women in the U.S. population are likely candidates for petite sizes; close to nine million probably look for tall sizes. While other measurements do enter into the size definition, available data is limited to height and weight relationships. There are an estimated 51.5 million women in the U.S. who are five feet three inches or shorter, but most weigh over 120 pounds. Only 30% weigh less than 120 lbs.

THE POTENTIAL MARKET

Estimated Number of Women 16 Years of Age & Over
By Height & Weight, 1984
(In Thousands)

	Total	% of total	Under 120 lbs.	% of total	120-149 lbs.	% of total	150 lbs. & over	% of total
Total	94,279	100.0%	21,401	22.7%	41,860	44.4%	31,018	32.9%
Height:								
5'3" or less	51,476	54.6	15,462	16.4	21,496	22.8	14,519	15.4
5'4" - 5'6"	34,035	36.1	5,468	5.8	16,027	17.0	12,539	13.3
5'7" or more	8,768	9.3	471	0.5	4,337	4.6	3,960	4.2

Source: Fairchild Market Research Department based on National Health Survey 1971-1974 by U.S. Department of Health and Human Services (formerly U.S. Dept. of Health, Education & Welfare) and U.S. Bureau of the Census projections for 1984 by age.

RETAIL SALES BY PRODUCT

The women's inner fashion industry, consisting primarily of nightwear, foundations, panties, robes, and slips conducted approximately $7 billion worth of business at the retail level in 1984. The largest component of this market is nightwear--nightgowns, pajamas, peignor/robe sets--which accounted for about $2.4 billion in sales.

Foundations constituted the next largest segment of the market at $2 billion, followed by panty sales of a little over $1 billion.

RETAIL SALES BY STORE TYPE

The only authoritative information on sales of women's inner fashions classified by specific store type is the census of retail trade series on merchandise line sales. Data collected from the 1982 Census is not scheduled to be released by the U.S. Census Bureau until late 1985. Therefore, the statistics used in the next few tables are either preliminary 1982 figures or from the last census of retail trade, which was conducted in 1977.

Brassieres, Girdles & Foundations

Department stores accounted for over 67% of reported sales of women's brassieres, girdles and foundations in 1977. Women's ready-to-wear stores' sales of $204.0 million represented 15.3% of the total.

RETAIL SALES BY STORE TYPE

Brassieres, Girdles & Foundations

Reported Sales of Women's Bras, Girdles, & Foundations by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number***	% of total	Mil. $	% of total
Bras, Girdles & Foundations	35,239	100.0%	$1,333.8	100.0%
Department stores*	7,884	22.4	894.8	67.1
Women's ready-to-wear stores**	14,820	42.1	204.0	15.3
Family clothing stores	8,807	25.0	169.3	12.7
Children's wear stores	118	0.3	0.7	0.1
Mail order houses	3,610	10.2	65.0	4.8

* Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarter operations, which are included in mail order house data.

**Detailed data on merchandise line sales of women's accessory & specialty stores (including furriers) were not included in the Census reports. There were a total of 4,962 stores in this classification with total women's and children's wear sales of $858.8 million in 1977.

***Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977
Merchandise Line Sales, RC77-L.

Lingerie, Sleepwear & Loungewear

In 1977, sales of women's lingerie, sleepwear and loungewear were reported at $2.14 billion in the leading store types. Department stores again took the lions' share with reported sales of $1.48 billion, 69.2% of the total.

RETAIL SALES BY STORE TYPE

Lingerie, Sleepwear & Loungewear

Reported Sales of Women's Lingerie, Sleepwear & Loungewear by Store Type, 1977
(includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number***	% of total	Mil. $	% of total
Lingerie, Sleepwear & Loungewear	38,826	100.0%	$2,143.8	100.0%
Department stores*	8,284	21.3	1,483.7	69.2
Women's ready-to-wear stores**	17,637	45.4	357.4	16.7
Family clothing stores	9,187	23.7	214.9	10.0
Children's wear stores	117	0.3	0.9	#
Mail order houses	3,601	9.3	86.9	4.1

(See footnotes on page 22.)

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales, RC 77-L

Contribution of Women's Inner Fashion Sales to Total Women's & Children's Wear in Key Store Types Reporting Sales, 1977

	Total Women's & Children's Wear Sales* (mil. $)	% of sales accounted for by: Bras, Girdles & Foundations	Lingerie, Sleepwear & Loungewear
Department stores	$ 16,250.7	5.5%	9.1%
Women's ready-to-wear stores**	11,066.5	1.8	3.2
Family clothing stores	3,471.6	4.9	6.2

* Excludes footwear sales.
**Excludes sales in women's accessory and specialty stores.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales, RC77-L.

RETAIL SALES BY STORE TYPE

Sales in Specialty Outlets

Figures presented here on specialty outlet sales are preliminary data from the 1982 Census. The 1977 sales are in current dollars so inflation must be taken into account as one factor for the huge increase from 1977 to 1982. Another factor is the growing acceptance by women of specialty stores for their inner fashion purchases.

Reported Sales of Women's Inner Fashions in Specialty Outlets, 1977 & 1982
(Includes only stores with payrolls)

	Sales (Mil. $)		
	1982	1977	% Change 1982/1977
Bras, girdles & corsets			
Women's ready-to-wear stores	$385.9	$204.0	+ 89.2%
Family clothing stores	296.4	169.3	+ 75.1
Lingerie, sleepwear & loungewear			
Women's ready-to-wear stores	690.6	357.4	+ 93.2
Family clothing stores	377.2	214.9	+ 75.5

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977, 1982

Operating Results: Department Stores

The following table shows trends in department store inner fashion merchandising based on the National Retail Merchants Association's annual surveys from 1979-1983. Dollar sales per square foot have increased virtually every year for every category. The cumulative mark up percentage, which measures the difference between the delivered cost of the merchandise and the cumulative selling prices originally set, has also risen steadily across-the-board.

Women's Inner Fashion Merchandising Results In Department Stores
With Total Volume Over $1 Million, 1979-1983
(Median Results)

	1983	1982	1981	1980	1979
Women's, Misses' & Juniors' Intimate Apparel					
Net sales % change over last year	8.5%	3.2	14.6	0.6	9.2
Cumulative mark up %	52.5%	52.4	51.4	50.8	50.5
Markdowns % to sales	8.4%	7.5	5.7	6.8	6.0
Inventory shortage % to sales	1.4%	1.4	1.3	1.3	1.3
Gross margin %	52.5%	52.4	52.5	51.3	51.1
Gross margin $ return per $ avg. cost inv.	$ 3.45	3.14	3.48	3.32	3.34
Turnover (no. of times)	3.3	3.2	3.5	3.4	3.4
$ Sales per sq. foot	$129.2	116.1	105.3	100.3	103.5

(continued)

RETAIL SALES BY STORE TYPE

Operating Results: Department Stores

Women's Inner Fashion Merchandising Results in Department Stores With Total Volume Over $1 Million, 1979-1983
(Median Results)
(continued)

	1983	1982	1981	1980	1979
Foundations					
Net sales % change over last year	5.7%	6.3	9.1	4.0	4.2
Cumulative mark up %	50.7%	50.4	50.0	49.4	48.9
Markdowns % to sales	6.0%	5.0	3.9	3.9	3.4
Inventory shortage % to sales	1.4%	1.3	1.6	1.5	1.6
Gross margin %	50.7%	51.2	51.0	50.7	50.0
Gross margin $ return per $ avg. cost inv.	$ 2.34	2.39	2.37	2.25	2.30
Turnover (no. of times)	2.5	2.6	2.5	2.6	2.6
$ Sales per sq. ft.	$148.4	147.1	141.0	125.7	122.0
All Sleepwear					
Net sales % of change over last year	9.5%	2.6	9.2	7.9	2.8
Cumulative mark up %	52.2%	51.8	51.3	51.0	50.5
Markdowns % to sales	13.3%	12.0	10.1	8.7	8.6
Inventory shortage % to sales	2.3%	2.3	2.2	2.3	2.2
Gross margin %	49.9%	49.5	52.5	49.7	49.7
Gross margin $ return per $ avg. cost inv.	$ 4.07	3.93	3.48	4.19	3.74
Turnover (no. of times)	4.1	4.2	3.5	4.5	4.4
$ Sales per sq. foot	$163.1	136.0	128.0	105.0	91.4
All Robes & Loungewear					
Net sales % of change over last year	10.7%	1.3	3.9	1.1	7.0
Cumulative mark up %	51.9%	51.6	50.9	50.5	50.4
Markdowns % to sales	16.2%	17.1	13.9	12.8	11.3
Inventory shortage % to sales	1.5%	2.0	1.9	1.9	1.9
Gross margin %	48.1%	47.2	49.8	47.8	49.5
Gross margin $ return per $ avg. cost inv.	$ 4.31	4.31	4.16	3.88	4.39
Turnover (no. of times)	4.5	4.4	4.3	4.4	4.8
$ Sales per sq. foot	$129.8	102.2	104.4	98.0	93.8

Source: National Retail Merchants Association, Merchandising & Operating Results, 1980-1984 editions.

Operating Results: Specialty Stores

The following 5 year comparison for specialty outlets with sales over $1 million idicates key merchandising and operating ratios for those stores reporting to the National Retail Merchants Association. Dollar sales per square foot have tended to be higher than those for department stores over this period.

RETAIL SALES BY STORE TYPE

Operating Results: Specialty Stores

Women's Inner Fashion Merchandising Results in Specialty Stores
With Total Volume Over $1 Million, 1979-1983
(Median Results)

	1983	1982	1981	1980	1979
Women's, Misses' & Juniors' Intimate Apparel					
Net sales % of change over last year	5.2%	1.5	13.7	6.8	13.1
Cumulative mark up %	52.9%	52.9	52.2	51.4	51.0
Markdowns % to sales	6.8%	7.6	5.6	8.0	7.8
Inventory shortage % to sales	2.0%	1.5	0.6	1.0	1.3
Gross margin %	51.9%	50.7	51.6	49.5	50.4
Gross margin $ return per $ avg. cost inv.	$ 3.74	3.35	3.29	3.59	--
Turnover (no of times)	2.9	2.7	2.9	3.1	3.3
$ Sales per sq. foot	$ 197.9	136.0	148.4	128.3	136.5
Foundations					
Net sales % of change over last year	0.8%	1.9	8.3	1.4	6.7
Cumulative mark up %	51.3%	51.0	50.8	50.5	49.9
Markdowns % to sales	6.4%	6.4	5.2	6.3	6.2
Inventory shortage % to sales	2.3%	1.9	1.3	1.6	1.1
Gross margin %	50.9%	50.0	50.7	50.7	47.1
Gross margin $ return per $ avg. cost inv.	$ 2.50	2.46	2.42	2.26	3.48
Turnover (no. of times)	2.2	2.0	2.2	2.2	3.8
$ Sales per sq. foot	$ 150.1	143.4	135.3	124.7	127.5
All Sleepwear					
Net sales % of change over last year	- 1.8%	2.9	6.3	4.7	11.5
Cumulative mark up %	52.5%	51.9	51.7	51.1	50.6
Markdowns % to sales	14.5%	16.2	12.8	14.8	12.2
Inventory shortage % to sales	1.8%	2.1	1.6	2.3	2.0
Gross margin %	47.8%	47.7	46.9	45.8	48.3
Gross margin $ return per $ avg. cost inv.	$ 4.48	3.60	5.43	6.50	--
Turnover (no. of times)	3.9	3.7	4.8	4.4	4.9
$ Sales per sq. foot	$ 207.0	132.0	128.4	111.6	111.5
All Robes & Loungewear					
Net sales % of change over last year	1.1%	- 4.4	8.4	7.5	2.2
Cumulative mark up %	51.4%	51.8	51.3	51.4	50.3
Markdowns % to sales	18.3%	19.5%	19.6	16.3	14.7
Inventory shortage % to sales	0.8%	1.2	1.4	1.5	1.4
Gross margin %	44.7%	43.7	44.9	46.4	46.5
Gross margin $ return per $ avg. cost inv.	$ 4.15	3.76	4.55	4.45	4.82
Turnover (no. of times)	4.2	3.8	4.1	3.9	4.8
$ Sales per sq. foot	$ 107.4	107.6	141.7	142.4	111.3

Source: National Retail Merchants Association,
Merchandising & Operating Results,
1980-1984 editions.

SEASONAL PATTERN IN RETAIL SALES

There is a distinct pattern in when women who choose to make their inner fashion purchases. The summer months and Christmastime are above average periods for these purchases.

Percent of Households Purchasing Inner Fashions by Month

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
% of households purchasing women's apparel--total	39.2	36.3	40.1	41.3	42.3	41.4	41.1	39.6	37.3	38.2	38.1	44.5%
Items purchased each month:												
Bras	5.2	4.5	5.5	6.0	5.5	6.9	6.4	6.0	5.4	4.5	3.6	5.1
Panties	5.0	3.8	5.2	4.7	5.6	5.5	5.9	6.1	4.7	4.5	4.0	4.9
Girdles/control garments	1.0	0.7	1.0	1.1	1.1	1.1	0.8	0.7	0.8	0.8	0.8	0.9
Slips & lingerie	1.4	1.3	1.7	2.6	2.6	2.1	2.1	1.8	1.6	1.5	2.2	2.5
Nightwear & robes	4.8	3.7	3.7	4.0	4.8	4.1	4.1	3.0	3.7	4.0	6.6	11.6

Source: Newspaper Advertising Bureau, 1985 Newspaper Advertising Planbook, based on National Purchase Diary survey, 1981

RETAIL ADVERTISING

Newspaper advertisements for inner fashion items are allocated throughout the year with the goal of having this advertising reach consumers when they are more prone to make their purchasing decisions (see previous table).

Percent of Total Newspaper Advertising Linage Done by Month, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Girdles & Bras	5.0	7.4	11.6	6.8	11.7	8.4	4.3	10.0	5.8	7.9	7.8	13.3	100.0%
Lingerie, sleepwear & robes	4.5	6.5	5.7	7.3	13.4	4.6	4.8	5.3	4.3	6.1	13.4	24.1	100.0%

Source: The Advertising Checking Bureau, 1983

CONSUMER PRICE TRENDS

In 1984, the Consumer Price Index for All Urban Consumers (CPI-U) showed a 3.4% gain for its women's underwear, nightwear and hosiery component over the prior year. Though this percentage increase was lower than that for all the items in the index, it was higher than the percent changes for both all apparel items and all women's apparel items. However, it should be noted that the 3.4% rise is lower than those for 1981, 1982 and 1983--6.5%, 6.5% and 3.7%, respectively.

CONSUMER PRICE TRENDS

Consumer Price Index For Women's Inner Fashions
1981-1984 Annual Averages
(1967=100 unless otherwise indicated)

	Annual Averages				% Change
	1984	1983	1982	1981	1984/1983
All items	311.1	298.4	289.1	272.4	+ 4.2%
All apparel commodities	187.0	184.5	181.0	177.7	+ 1.3
All women's apparel (1977=100)	109.0	107.5	105.5	104.3	+ 1.4
Women's underwear, nightwear & hosiery (1977=100)	137.4	132.9	128.2	120.4	+ 3.4

Source: U.S. Bureau of Labor Statistics

CONSUMER BUYING HABITS

Sales trends reported by NPD Special Industry Services, Port Washington, N.Y., show that consumer purchases of daywear increased 6% during the first six months of 1984 compared with the same period in 1983. The information is based on the findings of an ongoing monthly diary survey that tracks the apparel purchases of a panel of 8,000 nationally representative U.S. households.

This gain in unit volume was unevenly distributed by product line as half-slips declined 9% while camisoles registered a 30% increase. The study also indicated a growing acceptance by women of specialty stores for daywear purchases, while discount stores were used heavily for bras, girdles and panties.

Consumer Purchases in Units of Daywear, Jan.-June 1984

	% Change Jan.-June 1984 vs. Prior Year
Bras	+ 7%
Girdles	0
Panties	+ 6
Full-slips	+ 5
Half-slips	- 9
Camisoles	+30
Total	+ 6

Source: NPD Special Industry Services

Women's Innerwear

Percent of Purchases of Women's Innerwear by Type of Outlet, Fiber Content & Monthly Purchase Pattern, 1982
(For women aged 14 & over)

	Bras		Panties	
	Units	Dollars	Units	Dollars
Purchases by Outlet Type:				
Department stores	27.5%	38.8%	20.7%	28.4%
National chains	30.3	27.5	23.6	23.3
Discount stores, incl. K mart	26.0	15.6	32.9	24.5
Women's specialty stores	7.4	10.0	6.4	8.3
All other store types	8.9	8.2	16.4	15.4
Purchases by Fiber:				
100% polyester	23.4	23.5	9.4	7.3
Polyester blends	10.5	10.3		
100% cotton/cotton blends	4.1	4.2	26.9	25.4
100% nylon	32.7	32.4	39.9	40.3
Nylon blends	21.6	20.7	9.6	13.3
All other fibers	7.7	8.8	14.2	13.7
Purchases by Month:				
January	8.7	7.9	6.9	7.1
February	6.8	6.9	6.7	6.2
March	8.9	9.0	8.5	7.5
April	8.3	8.8	7.5	8.2
May	8.9	8.7	7.8	7.9
June	9.1	9.3	8.0	7.9
July	9.1	8.8	9.6	9.5
August	9.2	9.2	9.2	9.2
September	7.7	7.2	7.2	7.6
October	7.3	7.3	7.7	8.2
November	7.1	7.0	8.6	8.3
December	8.8	10.0	12.2	12.5

Source: NPD Special Industry Services.

Women's Nightwear

Percent of Purchases of Women's Innerwear by Type of Outlet, Fiber Content & Monthly Purchase Pattern, 1982
(For women aged 14 & over)

	Slips		Girdles & Other Foundations*	
	Units	Dollars	Units	Dollars
Purchases by Outlet Type:				
Department stores	33.5%	40.8%	37.9%	38.3%
National chains	17.8	17.3	24.2	25.4
Discount stores, incl. K mart	22.0	14.9	18.4	10.4
Women's specialty stores	14.5	16.7	8.5	14.4
All other store types	12.2	10.3	11.0	11.5
Purchases by Fiber:				
100% polyester/polyester blends	8.6	9.4	4.9	7.7
100% nylon/nylon blends	86.7	84.4	69.6	70.8
All other fibers	1.6	2.0	20.1	15.0
No answer	3.1	4.2	5.4	6.5
Purchases by Month:				
January	5.7	5.1	6.6	7.9
February	4.7	4.2	5.7	7.3
March	7.3	6.8	5.7	5.7
April	9.2	9.5	8.7	10.4
May	10.2	10.2	5.0	7.0
June	8.8	9.0	11.3	11.6
July	8.7	7.9	11.3	9.2
August	8.3	8.1	7.4	6.1
September	7.3	7.2	6.6	7.9
October	8.2	8.5	7.1	7.7
November	7.2	7.5	8.7	10.7
December	14.5	16.0	15.9	8.6

* Includes pants liners, all-in-ones and other control garments.

Source: NPD Special Industry Services

Percent of Purchases of Women's Innerwear By Price Points, 1982

	Bras		Girdles & Other Foundations*	
	Units	Dollars	Units	Dollars
Less than $4.00	39.3%	17.4%	35.9%	8.3%
$4.00 - 8.99	37.7	38.8	28.1	22.2
$9.00 & over	22.9	43.8	36.1	69.5

(continued)

CONSUMER BUYING HABITS

Women's Innerwear

Percent of Purchases of Women's Innerwear By Price Points, 1982 (continued)

	Panties	
	Units	Dollars
Less than $1.00	30.0%	13.6%
$1.00 - 1.99	46.3	41.9
$2.00 - 2.99	16.2	23.1
$3.00 & over	7.5	21.5

	Slips	
	Units	Dollars
Less than $6.00	40.9%	22.7%
$6.00 - 9.99	36.3	36.6
$10.00 & over	22.8	40.7

* Includes pants liners, all-in-ones and other control garments.

Women's Nightwear

Percent of Purchases of Women's Nightwear by Type of Outlet Fiber Content & Monthly Purchase Pattern, 1982 (For women aged 14 & over)

	Negligees		Hostess/Loungewear	
	Units	Dollars	Units	Dollars
Purchases by Outlet Type:				
Department stores	29.3%	37.7%	25.7%	30.5%
National chains	23.0	23.2	27.5	24.4
Discount stores, incl. K mart	29.9	19.2	26.9	17.3
Women's specialty stores	9.5	11.5	8.5	12.9
All other store types	8.3	8.4	11.4	14.9
Purchases by Fiber:				
100% polyester/polyester blends	25.4	26.3	58.5	61.2
100% cotton/cotton blends	14.4	15.0	6.8	10.8
100% nylon/nylon blends	35.9	36.9	12.1	9.4
Acetate blends	18.8	14.8	14.3	10.2
All other fibers	1.1	1.2	4.3	5.1
No answer	4.4	5.8	4.0	3.3

(continued)

Women's Nightwear

Percent of Purchases of Women's Nightwear by Type of Outlet, Fiber Content & Monthly Purchase Pattern, 1982
(For women aged 14 & over)
(continued)

	Negligees		Hostess/Loungewear	
	Units	Dollars	Units	Dollars
Purchases by Month:				
January	6.1%	6.0%	3.3%	3.6%
February	6.3	6.6	6.5	6.7
March	4.7	4.6	10.8	10.5
April	5.7	4.9	8.8	10.2
May	8.0	7.4	10.7	11.8
June	4.7	4.7	8.5	5.7
July	6.6	6.2	13.5	8.6
August	5.9	5.3	5.9	4.9
September	6.7	6.4	7.6	8.0
October	9.0	8.5	7.9	7.5
November	13.9	14.8	4.2	4.9
December	22.4	24.6	12.2	17.7

	Robes*		Pajamas	
	Units	Dollars	Units	Dollars
Purchase by Outlet Type:				
Department stores	26.7%	33.1%	27.6%	35.2%
National chains	24.4	24.0	31.7	30.0
Discount stores, incl. K mart	27.4	19.8	25.5	17.9
Women's specialty stores	12.9	15.7	9.5	10.2
All other store types	8.6	7.4	5.7	6.8
Purchases by Fiber:				
100% polyester/polyester blends	47.5	41.1	26.5	20.7
Acetate blends	27.1	27.7	10.9	10.3
100% cotton/cotton blends	4.2	3.8	31.3	24.2
100% nylon/nylon blends	10.2	9.5	23.5	29.4
100% acrylic/acrylic blends	6.5	6.3	4.7	7.1
No answer	4.6	5.7	3.0	4.3
Purchases by Month:				
January	9.6	9.0	6.0	5.8
February	5.4	5.1	4.5	4.0
March	6.8	5.0	6.8	6.8
April	4.9	4.3	4.1	3.4
May	10.2	8.7	6.3	5.5
June	7.9	7.2	6.1	6.0
July	7.5	6.1	7.7	7.2
August	5.3	5.0	3.8	5.0

(continued)

Women's Nightwear

Percent of Purchases of Women's Nightwear by Type of Outlet, Fiber Content & Monthly Purchase Pattern, 1982
(For women aged 14 & over)
(continued)

	Robes*		Pajamas	
Purchases by Month (continued)	Units	Dollars	Units	Dollars
September	3.9%	3.9%	5.9%	4.9%
October	5.8	6.1	10.1	8.6
November	10.4	12.6	17.1	16.1
December	22.3	27.2	21.7	26.8

* Includes housecoats, beach robes and beach coverups.

Source: NPD Special Industry Services.

Percent of Purchases of Women's Nightwear By Price Points, 1982

	Negligees		Pajamas	
	Units	Dollars	Units	Dollars
Less than $6.00	30.9%	13.8%	33.1%	15.0%
$6.00 - 9.99	32.3	26.0	33.2	28.7
$10.00 & over	36.8	60.2	33.7	56.3

	Robes			Hostess/Loungewear	
	Units	Dollars		Units	Dollars
Less than $10.00	25.5%	10.8%	Less than $7.99	34.8%	14.5%
$10.00 - 15.99	29.5	22.8	$8.00 - 15.99	36.7	32.8
$16.00 - 24.99	28.4	33.4	$16.00 & over	28.6	52.7
$25.00 & over	16.7	33.0			

Women's Slips

The market for women's slips is strongly determined by both the household income and the age of the purchaser as the following Gallup survey undertaken for Apparel Merchandising shows. Department stores are the preferred store type for women in the higher income and age brackets. Slip purchases are generally made once a year regardless of demographic considerations.

CONSUMER BUYING HABITS

Women's Slips

Place of Purchase of Women's Slips by Household Income of Purchaser

	Household Income			
	Under $10,000	$10,000-14,999	$15,000-24,999	$25,000- & over
Department stores	42.6%	31.5%	58.1%	54.3%
Sears	13.8	22.2	13.1	9.8
J.C. Penney	6.9	21.3	10.0	9.0
Discount stores	11.7	10.2	5.6	8.2
Independent lingerie shops	3.8	0.9	7.5	4.3
Montgomery Ward	2.7	2.8	1.3	1.6
Specialty chain stores	5.3	3.7	--	2.3
Off-price stores/Factory outlets	2.1	0.9	--	3.1
Catalog/Mail order	3.2	--	0.6	1.2
All other stores	8.0	3.7	5.0	5.1
Don't know	7.4	6.5	2.5	4.7

Source: Gallup Organization (Apparel Merchandising, May 1984)

Place of Purchase of Women's Slips by Age of Purchaser

	18-24	25-34	35-44	45-49	50+
Department stores	49.2%	43.5%	47.2%	53.1%	53.4%
Sears	8.6	15.6	13.2	16.0	12.5
J.C. Penney	15.6	13.4	15.3	9.9	4.2
Discount stores	1.6	11.3	6.9	12.3	8.0
Independent lingerie shops	9.4	5.9	2.8	--	2.2
Montgomery Ward	0.8	2.2	4.2	3.7	3.5
Specialty chain stores	6.3	1.6	3.5	3.7	1.0
Off-price stores/Factory outlets	0.8	2.7	2.8	2.5	0.3
Catalog/Mail order	--	1.6	0.7	--	2.9
All other stores	7.0	3.8	5.6	6.2	7.1
Don't know	7.8	4.3	4.9	4.9	8.0

Source: Gallup Organization (Apparel Merchandising, May 1984)

Buying Habits in Purchase of Women's Slips by Age of Purchaser

Age	Number of Slips Owned	Frequency of Purchase	Type of Slip Wanted in 1984	Percentage Who Buy on Sale
18-24	3	Once a year	Half-slip	56.3%
25-34	3	Once a year	Half-slip	60.2
35-44	3	Once a year	Half-slip	61.1
45-49	5	Once a year	Half-slip	55.6
50+	3	Once a year	Whole-slip	60.1

Source: Gallup Organization (Apparel Merchandising, May 1984)

CONSUMER BUYING HABITS

Teen Girls' Buying Habits

Seventeen Magazine conducts an annual Spring Apparel Buying Study to obtain data on the purchasing behavior of teen girls. Its 1984 survey, conducted in May 1984, revealed the preferences of a 2,000 member cross-section of this market. The results can be projected to national proportions of teen girls attending high school and college. According to the study, $13.2 billion was spent nationally by teen girls for their Spring wardrobes in 1984. Of this amount, an estimated $955 million, or 7.2%, was spent on inner fashions.

Projected Purchases of Inner Fashions by Teenage Female Students, Spring 1984

	Number Purchasing (Thous.)	Number Purchased (Thous.)	Total Expenditures (Mil. $)
FOUNDATIONS			
Bras, total	10,214	29,606	$ 260.4
Bandeau:			
- softcup	5,415	13,754	109.9
- light-padded	2,802	5,044	39.8
- underwire	1,679	3,560	40.4
Strapless/halter	3,465	3,708	36.7
One-size (stretch step-in)	857	1,568	10.9
Stretch coordinated sets (bra & brief)	744	1,972	22.7
Bodysuit-sized	386	448	7.6
One-size stretch	269	436	6.0
Girdles - Panty, brief	321	751	5.1
- Panty, short-leg	25	27	0.2
Tap pants	38	38	0.3
Total girls buying foundations	10,522	31,306	279.7
LINGERIE			
Panties - bikini	8,475	42,634	125.3
- regular	2,152	8,699	25.7
- brief	1,686	8,103	22.8
Slips - short	3,235	4,761	45.4
- long	1,053	1,055	10.8
- bra	1,127	2,384	22.9
Half-slips - short	3,818	5,340	44.3
- long	1,104	1,118	9.4
Total girls buying lingerie	11,379	74,094	306.7
SLEEPWEAR/LOUNGEWEAR			
Nightgowns - long	3,097	4,676	77.8
- short	1,819	3,221	39.1
Nightshirts - short	3,266	6,333	70.1
- long	652	749	7.6
Pajamas - shortie	1,675	2,678	30.5
- full-length	1,034	1,304	19.2
Robes - long	3,150	3,153	82.3
- short	1,052	1,117	28.9

(continued)

Teen Girls' Buying Habits

Projected Purchases of Inner Fashions by Teenage Female Students, Spring 1984
(continued)

	Number Purchasing (Thous.)	Number Purchased (Thous.)	Total Expenditures (Mil. $)
SLEEPWEAR/LOUNGEWEAR (continued)			
Long culottes/lounging pajamas/ at-home dresses	332	551	$ 12.9
Total girls buying sleepwear/loungewear	8,230	23,782	368.3
Total girls buying sleepwear	7,626	18,961	244.2
Total girls buying loungewear	3,777	4,821	124.0

Source: Seventeen Magazine
Spring Apparel Study, 1984

SCHEDULE OF ADDITIONAL FACT FILES

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (August)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1984 Edition available now -- 1985 Edition will be available in February, 1986)

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Stores and National/Regional Chains): Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1984 Edition available now -- 1985 Edition will be available in January, 1986)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments. (April)

FOOTWEAR (MEN'S, WOMEN'S, BOYS' AND GIRLS'): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics. (1984 Edition available now -- 1985 Edition will be available in September)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season. (July)

MAJOR APPLIANCES AND ELECTRICAL HOUSEWARES (Including a new Consumer Buying Intention Survey): Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (October)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., the size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet. (May)

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR (Including Tailored Casual Wear): Manufacturer level profiled by production, value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (November)

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations of large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Covers developments in brand name merchandising, store labels, designer labels, and off-price retailing.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (A Fact File Special Edition)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on the findings in the 1982 Census of Retail Trade issued by the U.S. Census Bureau in 1985. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, geographical changes, etc. (A Fact File Special Edition) (December)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (June)

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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